**{TEMPLATE}**

National Shipbuilding Research Program

**PROJECT MANAGEMENT PLAN**

Name of Project

**TECHNOLOGY INVESTMENT AGREEMENT #20XX-123**

Project Lead Organization

Team Member Organization #1

Team Member Organization #2

Team Member Organization #3

Date of Submission

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# Project Management Plan

*[Project Lead Organization]* plan for managing NSRP ASE Project Number 20XX-123 is laid out in the following sections. The Work Statement Summary provides a general overview of the work to be accomplished over the duration of the project. The Statement of Deliverables provides a description of the major deliverables to be submitted during the course of the project. The Payable Milestones Table describes the actual milestones to be paid.

## Project Team and Management Structure

The Project Team consists of *[Project Lead Organization (Acronym/Abbreviation)]* as the project lead, with *[other shipyards, design agents, software developers, educational institutions, industry experts]* as team members.

*[Provide brief background information on team members (i.e., why did the lead organization choose to work with these companies on the project; how are their credentials relevant to the achieving the objectives of this project]*

|  |  |
| --- | --- |
| Project Personnel LeadsLead Organization | First Name Last Name (Title)  |
| Team Member Organization | First Name Last Name (Title) |
| Team Member Organization | First Name Last Name (Title) |
| Team Member Organization | First Name Last Name (Title) |

## ATI Project Personnel

Project Technical Representative (PTR) First Name Last Name (Organization)

Program Manager (PM) First Name Last Name (Advanced Technology International)

## Project Organization

This project will be organized in a “Lead – Team Member” format. In this type of structure, *[Lead Organization]* has signed the Technical Investment Agreement (TIA) and will be responsible for overall project and program management, including all interfaces with the NSRP program management staff. Each Team Member will be issued a Purchase Order/Subcontract Agreement, which will refer to the scope of work and agreed to costs in the TIA. All contractual flow-down requirements in the TIA will be applied to each individual Team Member. *[Lead Organization]* will also include a statement which clarifies that the Team Member agrees to work in collaboration with the other named members under the contractual provisions of the TIA. An organizational chart of the project management team is shown below:

The technical team is comprised of experienced and diverse personnel, with collaborative involvement on many high profile NSRP projects in the past . . . . *[Provide a description of the capabilities of the project team and in meeting project objectives* *and responsibilities associated with each team can be further delineated in this section]*

## Schedule of Project Activities

This project intends to *[provide a short description of project with a bullet list of goals – examples below]*

1. Investigate . . . . .
2. Compare and collate . . .
3. Create and define . . . .
4. Demonstrate . . . .
5. Publish the final report . . .

Major Milestones for the Project *[it is recommended that project activities are divided by Phase]*

|  |  |  |
| --- | --- | --- |
| Phase | Activity | Team Member Responsible |
| 1 | Definition of . . . | Project Team |
|  | Development of . . .  | Team Member 1 |
| 2 | Development of . . .  | Project Team |
|  | Demonstration of . . .  | Team Member 1 and 2 |
|  | Final Product/tool/process | Project Team |

### Technical Project Reviews

### As finalized at the Project Kickoff Meeting held at *[Organization/Facility – usually held at the facility of the Project Lead]* on *[Month Day, Year],* the following Technical Project Review Meetings have been outlined below:

|  |  |  |
| --- | --- | --- |
| Quarterly Review  | Date | Location |
| Meeting | Date | Location |
| 1 | January 1, 20XX | Team Member 1 Facility |
| 2 | April 1, 20XX | Team Member 2 Facility |
| 3 | July 1, 20XX | Team Member 3 Facility |
| Final  | October 1, 20XX | Team Member 4 Facility |

### Work to be Performed

*[Bulleted list of tasks and associated deliverables, Gantt charts, flow charts and other workflow diagrams can be used to illustrate work to be performed]*

### Project Metrics

### Metrics will be reported in accordance with the intervals specified in the metrics table and procedures to be established by the Program Administrator.

### *[Metrics table below is from the Project Technical Proposal]*

|  |  |  |  |
| --- | --- | --- | --- |
| **Metric** | **“As-Is” Baseline** | **Project Goal** | **Tracking & Reporting Plan** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Project Budget and Milestone Schedule

Below is the milestone payment schedule in accordance with TIA No. 20XX-XXX. Each Team member will receive a similar attached payable milestone schedule where the dates have been adjusted (7-10 days earlier), to allow the Project Lead sufficient time to assemble team members’ supporting documents prior to deliverable submission date. Team members will also be provided with their discrete work scope and deliverable list that is aligned with their own specific payable milestones. Invoicing for milestone payments is planned per the payable milestone table below.

*[Include a budget summary table (by Phase) and/or milestone schedule from the Technology Investment Agreement (Attachment 3)]*

##  Technology Transfer Plan

*[The Technology Transfer Plan (TTP) can be part of the Project Management Plan or provided as a separate deliverable – if submitted separately, denote as such:* **The Technology Transfer Plan will be submitted as a separate deliverable**.]

Technology Transfer Plan Outline [the following should be included in the Technology Transfer Plan]

* Organization of Technology Transfer Activities
* Text Material Content
* Web Based Delivery of Materials
* Workshops and other Public Presentations
* Journal Papers & Professional and/or Trade Publications

To assist with the development of the Technology Transfer Plan, please refer to the [Technology Transfer & Implementation Facilitation Guide](http://www.nsrp.org/Key_Downloads/documents/Technology_Transfer_Guide.pdf) on the NSRP website.

## Software Development Plan

*[If no Software Development Plan is required for this project, denote as such:* ***A Software Development Plan for the project is not required as no software will be developed as a result of this project.****]*

*[If a Software Development Plan is required for this project, please refer to the* [*Software Development Plan Guide*](http://www.nsrp.org/Key_Downloads/documents/sdp.pdf) *on the NSRP website]*

## Communication Plan

*[Although not a formal requirement, incorporating a Communication Plan within the Project Management Plan can serve as a guiding map for internal project team communications throughout the duration of the project. Communication Plans can include report templates, presentation templates, project team contact information, communications and project-specific website information.]*

In addition to quarterly project review meetings, team members should be in regular communication with one another, through informal discussions and emails, as well as regularly scheduled conference calls and interim meetings. The Project Technical Lead, the Project Technical Representative and the Program Manager should also engage in regular communications for interim updates.

The following materials can be included in the Communication Plan:

* Team Members Contact Information [(Attachment 1)](#_Attachment_1_–)
* Communications Log [(Attachment 2)](#_Attachment_2_--)
* Report Templates:
	+ Quarterly Technical Reports [(Attachment 3)](#_Attachment_3_–)
	+ Other Business [(Attachment 4)](#_Attachment_4_–)
	+ Other Reports -- Formatting for other reports will be dictated by the milestones/deliverables being reported; i.e., demos, testing, development of tool or process)
* Presentation Template [(Attachment 5)](#_Attachment_5_)
* Project Website [if applicable] – *[Hyperlink]*

# Attachment 1 – Project Team Contact Information

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Title | Organization | Project Role | Telephone | email |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

# Attachment 2 -- Communication Log

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Date | Time | Team Members | Type of Communication | Issue-Related  |
| 3/1/20XX | 3:00 PM | Project Lead, PTR, Project Team Member 1, ATI | email | No – interim status call |
| 4/6/20XX | 10:00 PM | Project Team | telephone | Yes – schedule slippage |
| 5/15/20XX | All Day | Project Lead, Team Member 1, Team Member 2, ATI | Quarterly review |  |
|  |  |  |  |  |

# Attachment 3 – Quarterly Technical Report {TEMPLATE}

**QUARTERLY REPORT**

DATE \_\_\_\_\_\_\_

**Section I**

**Technical Status Report**

**Technology Investment Agreement xxxxxxxx**

**between**

**Advanced Technology International (ATI)**

**and**

**yyyyyyyy**

**for**

**(specific project name**)

Project Overview

*[Provide a short description of the project and objectives being addressed.]*

Technical Progress

This is the xxxx Technical Status report for the subject agreement. Technical efforts for the period \_\_\_\_\_\_\_\_ through \_\_\_\_\_\_\_ 20XX include:

* Continued xxxx
* Published yyyyy
* Held zzzzzzz
* Commenced aaaaaa

**Major Developments**

*[Describe key developments that have been achieved during this reporting period. Include short summaries of significant results that can be used for describing project accomplishments to a wide audience.]*

**Realized Benefits to Industry and Navy**

*[Provide a qualitative assessment of the benefits realized by the project lead, team members, and other non-participating industry members through technology transfer. A discussion on how the Navy has benefited from project execution should also be included. It is anticipated that once the project enters the implementation phase, quantitative returns will also be provided.]*

**Technology Transfer**

*[Describe activities/efforts that were accomplished during the reporting period to transfer technology beyond the project team members. These activities can include demonstrations, presentations, participation in symposia, etc.]*

Plans for the Next Quarter

*[Briefly list planned activities for the next period.]*

Project Issues

*[Briefly discuss any technical issues identified that may impact the current program progress. In addition to technical issues, list any subcontractors not under agreement or any subcontractor-related issues that may impact the current program progress.]*

**Schedule Issues**

*[Briefly discuss issues affecting the approved schedule and actions planned to adhere to approved schedule.]*

**Cost Issues**

*[Briefly discuss issues that may impact the contracted amounts for program funding and cost share.]*

**Action Items**

*[Discuss the status of any action items established between the project team and the PTR.]*

# Attachment 4 – Quarterly Business Report {TEMPLATE}

**Section II**

**Business Status Report**

**Technology Investment Agreement xxxxxxxx**

**between**

**Advanced Technology International (ATI)**

**and**

**yyyyyyyy**

**for**

**(specific project name)**

Agreement Summary Information

Total Amount of the Agreement: $

Total Estimated NSRP ASE Project Funding of the Agreement: $

Total Estimated Recipient Cost Share: $

Total Funds Obligated: $

Project Resource/Cost Information:

The following resources/costs are applicable to this project for the period \_\_\_\_\_\_\_\_ through \_\_\_\_\_\_\_ 20XX:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Company | Man Months Provided This Period \*\* | Cumulative Man Months Provided \*\* | Significant Material Costs This Period | Cumulative Material Costs | List of Personnel Working This Period |
| Recipient |  |  |  |  |  |
| Team Member A |  |  |  |  |  |
| Subcontractor X |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| Total |  |  |  |  |  |

\*\* As an alternate, actual costs (less material costs) may be provided in lieu of Man Months

Status of Milestones

|  |  |  |
| --- | --- | --- |
| MilestoneNumber and Description | Percentage Completed During this Period | Cumulative Percentage Completed |
| 1 – Design Document |  |  |
| 2 - etc |  |  |
| …  |  |  |
| X- |  |  |

Interest Earned $

Cost Share Provided by Project Participants

Cost share in the amount of $\_\_\_\_\_\_\_\_\_ is provided for this reporting period. Cumulative cost share to date for the project is $\_\_\_\_\_\_\_\_\_\_\_\_\_. The following summarizes the cumulative cost share provided for this project by category: \*IR&D matching funds should be identified separately and not included in the Overhead line.



The project participant funds reported are supported by the records of this organization or input provided by other team members and/or subcontractors and are for the purposes of completing NSRP-ASE TIA #\_\_\_\_\_\_\_\_\_\_. The amounts reflected for federal and non-federal sources are ***estimated*** *using the NSRP Program methodology specified in the TIA* and summarized as follows:

**Type A Matching Funds**: Private-sector participant provided funding from federally funded revenue sources and private-sector participant provided funding from federally funded revenue sources that might not meet the definition of Type B Match (e.g., fraction of the project labor charged to overhead that reflects the fraction of company revenue from federal contracts).

**Type B Matching Funds**: Private-sector participant provided funding from non-federally-reimbursed sources (That portion of project or program costs not borne by the Federal Government. Examples include funding from profit or a fraction of the project labor charged to overhead that reflects the fraction of company revenue from non-federal contracts).

**Public-sector participant provided funding** (formerly called ‘Donated services’ from naval shipyards & federal labs).

Note: If a project participant considers their ‘gross revenue fraction’ to be proprietary data, report the Total by category to the Prime, and provide a copy of this input to ATI along with the ‘gross revenue fraction’ to permit ATI to use in preparation of the NSRP Program Business Status Report to the Navy.

Discussion

This is the xxxx Business Status Report for the subject Technology Investment Agreement. The variance in expenditures is attributable to \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Modifications to Estimated Milestone Payments

*(When applicable)*

Attachment 1 contains a proposed modification to the Schedule of Payments and Payable Milestones reflecting \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Signature

Title

Date

**I certify to the best of my belief that this report is correct and complete and that all costs are supported by the records of this organization or input provided by other team members and/or subcontractors and are for the purposes of completing NSRP-ASE TIA # .**

# Attachment 5 -- Project Presentation {TEMPLATE}

